



**MAIL BIDS TO :
ENVOYER LES SOUMISSIONS À:**

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**SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION**

The referenced document is hereby revised;
 unless otherwise indicated, all other terms and
 conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf
 indication contraire, les modalités de l'invitation
 demeurent les mêmes.

Comments - Commentaires

**THIS DOCUMENT CONTAINS A
SECURITY REQUIREMENT / CE
DOCUMENT CONTIENT DES
EXIGENCES RELATIVES À LA
SÉCURITÉ**

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Title – Sujet Strategic Advisory Services – Sourcing and Benchmarking Service-conseils stratégiques – Approvisionnement et analyses comparatives	
Solicitation No. – N° de l'invitation 10031544/A	Amendment No. – 010
Client Reference No. – N° référence du client 13-1620	Date October 21, 2013
File No. – N° de dossier CAC10031544	
Solicitation Closes – L'invitation prend fin at – à 11 :59 PM on – le November 1, 2013	Time Zone Fuseau horaire Eastern Daylight Time (EDT) / Heure Avancée de l'Est (HAE)
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
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Delivery required - Livraison exigée See Herein	Delivered Offered – Livraison proposée
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : See Herein	
Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur	
Telephone No. – N° de téléphone	
Name and title of person authorized to sign on behalf of Vendor/firm (type or print)- Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date _____



This amendment is raised to answer Industry questions and modify the RFP, Solicitation Amendment 003, Solicitation Amendment 007, Annex A – SOW, and Attachment 4.1 – Technical Criteria.

Question 75:

Please find below a question with respect to the Amendment 006 for the above-referenced solicitation:

With respect to Answer 44, the definition provided for Bidder states that the Bidder "does not include the parent, subsidiaries or other affiliates of the bidder, or its subcontractors." Many of the large professional services firms have affiliates globally. Does this mean that bidders are limited to domestic reference projects only? Additionally, the answer seems to preclude any partnerships between firms through subcontract agreements (which is typically how firms partner) as only the specified bidder's project references, etc. will be considered for evaluation purposes. Please confirm as if this is indeed the case, this could significantly reduce the number of potential bidders.

Answer 75:

Bidders are not limited to domestic reference projects only.

For the purpose of this RFP, Canada is redefining Bidder as a "Persons or entity submitting a bid to perform a contract for goods, services or both".

For evaluation purposes of this RFP, the experience of the parent, subsidiaries or other affiliates of the Bidder may be considered.

For bidding purpose of this RFP, Canada will not consider any partnerships or joint ventures between firms through subcontracting agreements. However, Canada will permit the use of subcontracting agreements to fulfill the Work under the contract in accordance with Part 7, Clause 7.2 Task Authorization provisions, if necessary.

See Modifications 036, 038, and 041.

Question 76:

The response to Q&A #44 includes the following definition of a bidder: "Bidder: Person or entity submitting a bid to perform a contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the bidder, or its subcontractors." Given the complexity of the proposal and the number of project references required to not only be compliant, but also score the maximum available points, the above definition of 'bidder' is going to greatly affect the responses of many firms and will limit the number of firms that will be able to submit strong compliant responses given the fact that firms will not be able to use the references of other member firms globally to qualify.

Would the Crown consider allowing the experience of member firms (parents and other associated firms under the parent, subsidiaries and other affiliates) for the purposes of this solicitation in order to demonstrate firm wide and global experience?

Answer 76:

Canada will allow the experience of parent, subsidiaries or other affiliates of the bidder for the purposes of this solicitation in order to demonstrate firm wide and global experience.

See response to Question 75 and Modifications 036, 038, and 041.

Question 77:

Would SSC consider revising R1 and R5 to state as follows:



R1

The Bidder should have delivered consulting services for engagements completed within the last seven (7) years where each individual consulting engagement resulted in an outsourcing contract with a total value of greater than \$20 million. The \$20 million value refers to the total contract value of the outsourced services between the bidders client and its sourcing service provider, and not the value of the consulting engagement between the bidder and its client. Twenty (20) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of five (5) engagements.

R5

The Bidder should have delivered IT consulting services for engagements completed within the last seven (7) years in addition to any previously stated references in the Mandatory Requirements where each individual consulting engagement resulted in an outsourcing contract with a total value of greater than \$20 million. The \$20 million value refers to the total contract value of the outsourced services between the bidders client and its sourcing service provider, and not the value of the consulting engagement between the bidder and its client. The engagements must be different from those provided in response to any Mandatory or other Point-Rated Requirements. Twenty (20) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of five (5) engagements

Answer 77:

See Modifications 038, R.1.

Question 78:

With regards to Modification 027, the Crown would seem to have set two different and conflicting thresholds for the same activity. E.g., bullet (a) reads that the project must have an outsourced contract worth at least \$1B while bullet (b) reads the project must have an outsourced contract worth at least \$500M over 5 years. Given the scoring approach adopted for this requirement does not allow for partial scores, it is unclear why two thresholds have been provided.

It is our experience that most if not all transformation associated with outsourced contracts on the scale and size outlined in this RFP are accompanied by the creation or optimization of a broader shared service organization. Consequently, we understand the intent of Modification 027 is as follows.

1. The requirement for bullet (a) is to cite a transformation initiative that has a project value in excess of \$1 billion, which may include an outsourcing component. For example, a company may create an IT Shared Service valued at \$1.2B annually and outsource \$300M annually for network services. This would qualify under bullet (a).
2. The requirement for bullet (b) is to cite a specific outsourcing initiative where the IT outsourcing contract value was in excess of \$100 million for a minimum of 5 consecutive years, which may have been part of a broader transformation project. For example, a company may create an IT Shared Service valued at \$500M annually and outsource \$100M annually for 5 consecutive years. This would qualify under bullet (b).

Please confirm our understanding.

Answer 78:

See Modification 038, R.3.



Modification 032

On page 6 of 55 of the RFP, Section 1.3 Restriction for Future Related Work:

Delete in its entirety

Insert: The Contractor selected through this procurement will support the planning and development of subsequent competitive procurements for the execution of transformation projects within the scope of the GC transformation programs, as outlined, but not limited to those stated in Annex A – Statement of Work. As a result, this Contractor will be given information during the completion of the Contract that is not available to other bidders, which would give them an unfair advantage for subsequent competitive procurements.

To remove any possibility for future conflict of interests, the Contractor will be disqualified from any future competitive solicitation(s) which are developed under the scope of the resulting Contract. The Contractor may also be disqualified from any future competitive solicitations about which it has access to information that would appear to give it an unfair advantage on those solicitations. Similarly, any other person or entity who is involved in any manner in the preparation of a future solicitation, is in any other situation of conflict of interest, or who has access to information that appears to give them an unfair advantage on the future solicitation may also have their bid rejected by Canada.

Modification 033

On page 14 of 55 of the RFP and page 10 of 21 Solicitation Amendment 003 – Modification 012, Subsection 4.2.3.4

Delete: Bidders should substantiate for each Point Rated Technical Criteria R.1 to R.6 their claim that they fulfill the criteria by providing the required information as stated by the criteria. Bidders should provide sufficient detail (a description of the project and its relevance to the criteria) to substantiate the extent to which its references satisfy the criteria.

Insert: Bidders should substantiate for each Point Rated Technical Criteria R.1 to R.3 their claim that they fulfill the criteria by providing the required information as stated by the criteria. Bidders should provide sufficient detail (a description of the project and its relevance to the criteria) to substantiate the extent to which its references satisfy the criteria.

Modification 034

On page 14 of 55 of the RFP and page 10 of 21 Solicitation Amendment 003 – Modification 012, Subsection 4.2.3.6

Delete: Bidders should include client references for each of the Point Rated Technical Criteria R.1 to R.6. Bidders are requested to submit references for R.1 to R.6 using the Client Reference Contact List for Point Rated Technical Criteria (Form 3).

Insert: Bidders should include client references for each of the Point Rated Technical Criteria R.1 to R.4. Bidders are requested to submit references for R.1 to R.3 using the Client Reference Contact List for Point Rated Technical Criteria (Form 3).



Modification 035

On page 15 of 55 of the RFP, Section 4.2.3 Point-Rated Technical Criteria, subsection 4.2.3.7:

Delete in its entirety.

Insert: The Maximum Total Technical Score that can be allocated for the Point-Rated Technical Criteria is 700 points.

Modification 036

On page 16 of 55 of the RFP, Section 4.2.4 Reference Validation Checks, Subsection 4.2.4.6:

Delete in its entirety.

Insert: Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if the customer reference states he or she is unable or unwilling to provide the information requested. Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

Modification 037

On page 35 of 55 of the RFP:

Add: 7.25 Restriction for Future Related Work

The Contractor will support the planning and development of subsequent competitive procurements for the execution of transformation projects within the scope of the GC transformation programs, as outlined, but not limited to those stated in Annex A – Statement of Work. As a result, the Contractor will be given information during the completion of the Contract that is not available to other bidders, which would give them an unfair advantage for subsequent competitive procurements.

To remove any possibility for future conflict of interests, the Contractor will be disqualified from any future competitive solicitation(s) which are developed under the scope of the resulting Contract. The Contractor may also be disqualified from any future competitive solicitations about which it has access to information that would appear to give it an unfair advantage on those solicitations. Similarly, any other person or entity who is involved in any manner in the preparation of a future solicitation, is in any other situation of conflict of interest, or who has access to information that appears to give them an unfair advantage on the future solicitation may also have their bid rejected by Canada.

Modification 038

On page 43 of 55 of the RFP and page 14 of 21 Solicitation Amendment 003 – Modification 018, Attachment 4.1 – Technical Criteria:

Delete in its entirety.

Insert: Attachment 4.1 – Technical Criteria below.



Modification 039

On page 52 of 55 of the RFP, page 19 of 21 Solicitation Amendment 003 – Modification 020, and page 11 of 11 of Solicitation Amendment 007 – Modification 029, Form 3:

Delete in its entirety.

Insert: See Form 3 below.

Modification 040

On page 54 of 55 of the RFP and page 20 of 21 Solicitation Amendment 003 – Modification 021, Form 4:

Delete in its entirety.

Insert: See Form 4 below.

Modification 041

On page 5 of 21 of the Annex A – Statement of Work, Section 3 Requirement:

Insert: “The contractor will provide and assign resources who demonstrate global experience on large scale IT sourcing initiatives, on an as-and-when-required basis, of which resources will be evaluated for such experience as part of the Task Authorization process.”



ATTACHMENT 4.1 – TECHNICAL CRITERIA

Substantiation of Technical Compliance

Note to Bidders: Read all of the following criteria in relation to size, scope and complexity of the work requirements described in Annex A – Statement of Work.

Only references of the Bidder, the parent, subsidiaries or other affiliates of the Bidder may be used for evaluation.

Unless otherwise indicated, client references provided for each technical criterion may be used in a separate technical criterion. For example, if References A, B, and C are used on M.1, they can also be used for M.2.

The Shared Services Canada (SSC) evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.

1. Mandatory Requirements

Note that failure to provide the required information will result in a non-compliant proposal.

Wherever a client reference is requested in the mandatory requirements, the proposal **must** include client references.

Criteria ID	Criteria	Met / Not Met
M.1	<p>The Bidder must have delivered advisory services in support of the planning, designing and execution of information technology (IT) sourcing strategies for three (3) distinct Bidder engagements, completed within the last seven (7) years, where each engagement meets the following conditions:</p> <ul style="list-style-type: none"> a. The (IT) sourcing strategy was centered on the outsourcing of data centre services, network services, end-user computing and desktop services, or IT security services; b. The Bidder engagement resulted in an outsourcing contract between the client and its service provider, valued at greater than \$500 million; and c. The Bidder was the lead sourcing advisor for the engagement. <p>The Bidder must substantiate their claim for each engagement.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.2	<p>The Bidder must have delivered IT sourcing strategies, centered on the outsourcing of data centre services, network services, end-user computing and desktop services, or IT security services, to an organization that resides in a World Trade Organization signatory country, other than Canada where each engagement was completed within the last seven (7) years, for three (3) distinct Bidder engagements.</p> <p>The Bidder must substantiate their claim for each engagement.</p>	



Criteria ID	Criteria	Met / Not Met
	The Bidder must provide a client reference for each substantiated engagement.	
M.3	<p>The Bidder must have delivered advisory services in support of the planning, designing and execution of IT benchmarking activities completed within the last seven (7) years, for three (3) distinct Bidder engagements, where each engagement must be from an organization with a minimum of 40,000 employees.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.4	<p>The Bidder must have delivered IT benchmarking activities where each Bidder engagement had a contract value of greater than \$500,000 with its client, completed within the last seven (7) years, for three (3) distinct Bidder engagements.</p> <p>The Bidder must substantiate their claim for each engagement.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.5	<p>The Bidder must have delivered services to transformation initiatives involving data centre consolidation, completed within the last seven (7) years, for two (2) distinct Bidder engagements, where each engagement was with organizations with a minimum of 40,000 employees.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.6	<p>The Bidder must have completed the preparation of competitive procurement materials specific to all of the following items for Sourcing Agreements, within the last seven (7) years, for two (2) distinct Bidder engagements:</p> <ul style="list-style-type: none"> a. Statement of Work/Requirements for Sourcing Agreement; b. Technical Evaluation Criteria and Process for Sourcing Agreement; c. Financial Evaluation Criteria and Process for Sourcing Agreement; d. Terms and Conditions of Sourcing Agreement; and e. Support for negotiation of contracts with prospective suppliers, including software contracts. <p>The Bidder must substantiate their claim for each engagement. For the purposes of this requirement, each engagement must be for an organization with a minimum of 40,000 employees.</p> <p>The Bidder must provide a client reference for each substantiated engagement.</p>	
M.7	<p>The Bidder must have a physical office in at least three (3) continents.</p> <p>For the purposes of this criteria, the continents are defined as follows:</p> <ul style="list-style-type: none"> - North America; - South America; - Europe; - Asia; - Africa; and 	



Criteria ID	Criteria	Met / Not Met
	<p>- Australia.</p> <p>The Bidder must provide the address and contact name for a minimum of three (3) offices.</p>	
M.8	<p>The Bidder must demonstrate a “bench-strength” consisting of a minimum of fifty (50) existing qualified employees available to provide the advisory sourcing and benchmarking services required to meet the requirements as described in Annex A – Statement of Work.</p> <p>The Bidder must provide a table containing the following information for each existing employee:</p> <ol style="list-style-type: none"> 1. Name 2. Title 3. Educational Degree / Certification 4. Number of years as an employee with the Bidder 5. Years of Experience 6. Domain of relevance: Sourcing or Benchmarking 7. Project Experience <ol style="list-style-type: none"> a. Global (i.e. outside of Canada) (Yes/No) b. Participation of employee where a Project reference was valued at greater than \$20 million (Cdn) (Yes/No) <p>To meet the mandatory requirement, the Bidder must demonstrate a minimum 20% of resources positively corresponding to items numbered 7 (a) and 7 (b) above.</p>	
M.9	<p>The Bidder must demonstrate a corporate approach to tools, methodology and the existence of a vendor/market intelligence database used in the development and delivery of sourcing strategies and benchmarking activities.</p> <p>The proposal must provide a description with sufficient detail to substantiate the extent to which the Bidder’s methodology and approach addresses the following elements:</p> <ol style="list-style-type: none"> a. Sources of information and best practices; b. The extent to which the knowledge base captures the Bidder’s global experience; c. Regular updating of the knowledge base; d. Regular updating of price information related to IT sourcing requirements; and e. Acquisition of information and best practices from a “practitioner” vs. a “research” point of view. 	



2. Point Rated Requirements

Note that failure to provide the required information will result in a score of zero.

Criteria ID	Criteria	Maximum Points Available
R.1	<p>The Bidder should demonstrate that it has completed IT sourcing engagements, within the last seven (7) years, which meet the following criteria:</p> <ul style="list-style-type: none"> a. The Bidder was the lead sourcing advisor for the engagement; b. The (IT) sourcing engagement was centered on the outsourcing of data centre services, network services, end-user computing and desktop services, or IT security services; c. The value of the Bidder engagement had a contract value greater than \$2 million; d. The Bidder engagement resulted in an outsourcing contract between the client and its service provider, valued at greater than \$500 million; and e. The client organization had a minimum of 25,000 employees. <p>Twenty (20) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of five (5) engagements.</p>	100
R.2	<p>The Bidder should have delivered IT benchmarking services for engagements completed within the last seven (7) years where the services were provided for organizations with more than 25,000 employees.</p> <p>Ten (10) points will be awarded for each completed engagement with substantiation and client reference, up to a maximum of ten (10) engagements.</p>	100
R.3	<p>The Bidder should demonstrate that it has completed IT sourcing engagements, within the last seven (7) years, which meet the following criteria:</p> <ul style="list-style-type: none"> a. The Bidder was the lead sourcing advisor for the engagement; b. The (IT) sourcing engagement was centered on the outsourcing of data centre services, network services, end-user computing and desktop services, or IT security services; and c. The engagement resulted in an outsourcing contract valued in excess of \$100M for annual service charges for a minimum of 5 consecutive years. <p>One hundred (100) points will be awarded for each engagement up to a maximum of five (5) projects.</p>	500



**FORM 3
CLIENT REFERENCE CONTACT LIST
FOR POINT RATED TECHNICAL CRITERIA**

Point Rated Technical Criteria	Client Reference Number	Client Reference (Company Name)	Contact Name	Title	Email	Phone Number
R.1	1					
	2					
	3					
	4					
	5					
R.2	1					
	2					
	3					
	4					
	5					
	6					
	7					
	8					
	9					
	10					
R.3	1					
	2					
	3					
	4					
	5					



**FORM 4
SUBSTANTIATION OF TECHNICAL COMPLIANCE
CROSS-REFERENCE LIST**

Mandatory Technical Criteria	Client Reference Number	Reference to Substantiating Materials included in Bid (Title, Page and reference number)
M.1	1	
	2	
	3	
M.2	1	
	2	
	3	
M.3	1	
	2	
	3	
M.4	1	
	2	
	3	
M.5	1	
	2	
M.6	1	
	2	
M.7	1	
	2	
	3	
M.8	n/a	
M.9	n/a	

Point Rated Technical Criteria	Client Reference Number	Reference to Substantiating Materials included in Bid (Title, Page and reference number)
R.1	1	
	2	
	3	
	4	
	5	
R.2	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
	10	
R.3	1	
	2	
	3	
	4	
	5	